MANUAL FOR

FOR SMALL PUBLIC LIBRARIES

Volume One

COLLECTION DEVELOPMENT

Alberta
CULTURE AND MULTICULTURALISM

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COLLECTION DEVELOPMENT AND ASSESSMENT

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Library Services

Volume 1

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FOREWORD

This manual, which has been produced in two volumes, was written for staff of libraries in small (population under 5,000) and medium-sized (population 5,000 - 10,000) communities in Alberta. Volume One provides an overview of the entire collection development process to be used by public libraries. Volume Two provides information to enable the staff to independently analyze the library's adult nonfiction collection and determine what its strengths and weaknesses are. Emphasis has been placed on subject areas to be considered rather than on titles to be purchased. No effort has been made to provide extensive lists of recommended titles, since each library must build its collection in its own way to suit the needs of the community it serves.

Volume One of the manual was compiled from some elements of the Collection Development course of the Rural Library Training Project offered by the Southern Alberta Institute of Technology. Volume Two is based on the concept used in "A Bare Bones Adult Nonfiction Collection for Small Vermont Public Libraries" prepared by Marianne K. Cassell.

The manual was commissioned and edited by the staff of the Library Services Branch of Alberta Culture and Multiculturalism, who gratefully acknowledge the assistance of the staff of libraries and library systems in Alberta who provided invaluable suggestions during the editing process.

Chapter One

INTRODUCTION

Collection development and assessment is an on-going concern for librarians in public libraries. This manual addresses this concern. Volume One discusses the process of collection development. Volume Two provides a method for doing an assessment of the collection.

What is collection development? It is the process of building or improving a collection of library materials. It is a process whereby each purchase, and each candidate for discard, is carefully evaluated in terms of the needs it meets and its place in the collection. It is an on-going process that changes as the community changes.

Collection development will be much more relevant to your particular library if you include it in the *needs assessment process* by which you identify your potential users and their interests.

A needs assessment provides insight into the educational, recreational and cultural backgrounds and needs of your community, as well as its business and commercial interests. A needs assessment of your community should provide two types of information related to collection development:

1. General information about your community, including size of various age groups, levels of education and income, and areas of interest. This information allows library boards and staff to determine general needs which the collection must serve.
2. Information about what your community sees as its library needs, including its needs for materials. These needs can be quite specific, having been identified by certain age or interest groups included in various parts of the needs assessment. Knowing the interests and age levels of your prospective users leads to assumptions about the levels of difficulty and formats which will best meet their requirements. For example, the public library in a community with French immersion will need support materials for parents and children.

A needs assessment report consists of at least two parts: a description of what the library is doing now and an outline of what the library ought to be doing to meet the needs of its users. There is a variety of ways to do a needs assessment. Refer to the *Needs Assessment Handbook: A Close-Up Look*, Volume 1, published by Alberta Culture and Multiculturalism, Library Services Branch for information on three basic methods to assess library needs of the community. "Community" is defined here as those people who use your library or are potential users of your library. The community is all of the residents of your municipality and perhaps, depending on your circumstances, the residents of adjoining rural areas.

A method for doing a needs assessment not covered in the handbook is surveys and questionnaires. Although these are mentioned here, you should be aware that a questionnaire must be well designed in order to obtain valid results. Some of the things you might want to find out through a survey or questionnaire are: who uses the library; why some people do not use the library; what services library users use the most; and, what services people consider the most important. Printed questionnaires could be distributed to some or all of your community to obtain this information.

Knowing what the library has in its collection, and knowing the wants and needs of the community, the librarian and the library board can plan ahead to meet those needs through a plan of service. A plan of service document clearly states the library's goals, objectives, priorities, and strategies for meeting these goals and will set out the direction in which the library will be going. Alberta Culture and Multiculturalism's *Needs Assessment Handbook*, Section 5, describes stages in the planning process.

Chapter Two

COLLECTION DEVELOPMENT POLICY

Policies are principles or guidelines which assist the library board to make day-to-day decisions and to achieve its mandate. They give definition to the philosophy of library service in the community and provide for the establishment of consistent operational procedures. They affect the library community as a whole, and are public statements which are available to anyone. Policies should be reviewed regularly to ensure that changes in user needs, priorities and budget are recognized. Changes are subject to library board approval.

After the needs assessment process has been carried out, and its findings interpreted, the first task is to review the collection development policy. A collection development policy defines, in both broad and practical terms, the relationship of the collection — its size, usefulness, and relevancy — to the library's goals and to the community it serves. It describes why the collection exists and what the collection will contain.

A collection development policy is a written document that serves as a guide to library staff in:

- selecting and buying materials for the library;
- accepting gifts and donations;
- weeding and disposing of weeded material and gifts or donations;
- providing information to the public regarding the reasons for the selection or rejection of any materials;
- handling complaints from library users about controversial material; and,
- deciding whether to buy particular items requested by patrons.

The collection development policy consists of several elements.

A. Materials Selection

The collection development policy includes a statement on selection which describes the library's objectives and priorities which will ultimately determine the character of the collection.

1. **Responsibility for selection should be designated.**

   The library staff should be responsible for selection of library material.

2. **The general criteria for selection should be described.**

   These should include:

   a) Guidelines reflecting the community and its needs.

   The Canmore Public Library's statement says that the library will provide as wide a spectrum of materials as budgeting and space limitations will allow, with emphasis on:

   - materials relating to accumulation of historical, scientific, social and cultural knowledge,
   - materials of current and future significance and interest,
   - materials which stimulate imagination, creativity and curiosity,
   - materials which increase the individual's ability to function as a productive member of society,
   - materials which entertain and thus enhance the individual's enjoyment of life.

   b) Whether review sources will be consulted.

   The Tofield Municipal Library Policy states that "the librarian should work as much as possible from recognized review media and bibliographies in building a collection. An attempt should also be made to keep up with reviews in popular magazines and on television as these are the books patrons are likely to request."

   c) Guidelines which will be applied to all book and non-book materials.

   The Canmore Public Library Policy states that "Materials will be evaluated and selected according to:

   a. suitability of format,

   b. accuracy of information,

   c. relevance to community needs and interests,

   d. avoidance of duplication and collection imbalance,

   e. budgeting and space limitations."

3. **Special Considerations**

   What types of materials and what special factors will be considered for the collection, and why? Considerations are:

   - when will multiple copies of single titles be considered for purchase;
   - will lost materials automatically be replaced;
   - will foreign language materials and talking books for those unable to read conventional print be purchased or will these materials be provided through Alberta Culture and Multiculturalism, Library Services Branch;
   - will large print books be purchased; and,
   - will a statement be included that indicates that all sides of the issue will be equally represented when material on controversial issues is to be included in the collection.

4. **If desired, indication may be given of how the collection will be developed in specific areas, and what subject fields may be emphasized.**

   This statement should be quite general, allowing for more specific direction under the selection procedures. A library in a farming community might designate "agriculture", "recreation", and

"conservation" as important areas. The procedures for selection will specify which topics within these areas will be emphasized.

5. **The boundaries of collecting should be defined.**

   For example, what is meant by "materials"? Will the library buy audio-visual material such as records and videotapes which meet the guidelines outlined above, or will it provide only books and periodicals? Will the library limit its collecting in certain subject areas? If your library is part of a system, or works closely with another local library, you may wish to share the collecting.

B. Accepting Gifts and Donations

The conditions under which gifts will be accepted should be outlined. Libraries should apply the same selection guidelines to gift materials as are applied to purchased materials, since processing and storage costs are the same for both. It is usually wise to state that gifts will be accepted only if the decisions about whether or not they are to be added to the collection and where they will be placed are left to the library. It could be suggested that persons wishing to purchase materials for the library consult with library staff to determine what materials would be most appreciated.

C. Weeding

A written statement about the reasons for discarding library materials should be included in the collection development policy. The reasons should include: lack of use; poor physical condition; inappropriate, duplicated, or superseded material; poorly written content; and, age of material. The weeding policy should state that weeded material, including gifts and donations, will be disposed of at the discretion of the librarian.

D. Handling Patrons' Objections

1. **Censorship**

   The collection development policy should include a statement about intellectual freedom. Censorship is something all libraries attempt to avoid and a definite statement against it is a good start. Many libraries have chosen to use the Statement of Intellectual Freedom adopted by the Canadian Library Association. You can obtain a copy of this statement from Alberta Culture and Multiculturalism, Library Services Branch. Another statement often made regarding censorship suggests that while any individual has the right to reject for himself books of which he does not approve, he does not have the right to restrict the reading of others. Censorship denies individuals the opportunity to choose from all possible alternatives.

2. **Handling Complaints**

   The intellectual freedom section of the collection development policy should include a general statement about how complaints are handled. You are bound to get the occasional complaint about materials in your library. It is important to have a definite procedure laid out so that complaints are handled consistently by library staff. Many of the people who complain about library materials do not want to make a formal complaint. They only wish to express their opinions, and find out the library's reasons for having the materials in the collection. The option of making a formal complaint should be presented, but more often than not, it will not be taken up.

Guidelines for a collection development policy can be summarized as follows:

1. Libraries should identify the long-term and short-term needs of their communities and establish priorities for the allocation of resources to meet those needs. The needs will have been identified through the needs assessment already carried out.
2. Collection development policy statements should be reviewed regularly to be sure that changes in library goals, user needs and budgetary considerations are taken into account. When the needs assessment is updated to provide current information about the community, a major policy revision may be required.
3. The policy statement should be coordinated with those of other appropriate libraries. Libraries which are part of a regional library system should allow for cooperation as outlined by the system. Non-system libraries which are in close proximity to other libraries may coordinate selection with those libraries.

Meeting each of these guidelines will require a close look at:

- the *clientele* to be served, in terms of age, educational background or ethnic groups;
- the kinds of *programmes* to be offered, meaning loaning of books, reference service, or whatever services the library hopes to provide; and,
- the *limits for collection*, such as what formats (book, periodical, or audio-visual) will be included, which subjects will not be included because of cooperative agreements with other libraries and because of space limitations, and what budgetary constraints there are.

These factors should be considered in light of the existing collection, the level at which the library is now collecting, and what is considered a desirable level of collecting to meet the identified programme needs.

Chapter Three

SELECTION OF MATERIALS

Selection should be an on-going process in a public library. It is done as needs are identified, as the review magazines arrive or as the exhibits take place. Since the greatest number of new releases are published in the spring and fall, many libraries purchase their new books at these times. Selection decisions, however, are made throughout the year.

Whether making selection decisions through examination of books or through the use of review sources like those listed in the section on Selection Tools, guidelines for judging materials for selection can be divided into two broad categories: those dealing with the content of materials; and, those dealing with their physical form.

A. Content

1. **Purpose, Scope, and Audience**

   Does the purpose of the work correspond with the purpose of the library as stated in its mission and policy statements? Is the work's scope unique or interesting enough to be included in the library? Does the audience intended by the writer match the audience who uses your library?

2. **Level of Writing or Presentation**

   Is the book written at an appropriate level of difficulty for the patrons who will use it? Do you have books of different levels of difficulty?

3. **Authority, Honesty, and Credibility of Author**

   Certain authors are known for their high standards and are usually well-received by critics and public alike. If other aspects such as purpose, audience and scope are met, you are usually safe in purchasing books by these authors.

4. **Subject Matter**

   High demand for a certain subject may force you to look at titles that fail some of these tests of evaluation. However, if the material does not meet *any* of your guidelines, it is unlikely to satisfy the demand for which it is being considered. On the other hand, a requested item that meets or exceeds all of your other guidelines may be on a subject for which there is no demand in your community. If you cannot foresee the material being used, it should be passed over. The title can be ordered through interlibrary loan for the one individual who requests it.

5. **Comparison**

   How does the work under consideration compare with other works available or already in the collection? In cases of high demand, it may be better to buy another copy of a superior title which you already have than to add a new title of mediocre quality.

6. **Timeliness**

   In the pamphlet *Why Public Libraries*, distributed in 1985 by Alberta Culture and Multiculturalism, author Malcolm Getz suggests that the half life of a book of fiction is about one year from its publication and that of a book of non-fiction, about two years. This means that the number of times a book will circulate in its first one or two years may represent half of the total number of times it will be borrowed. This formula is an important one to keep in mind when considering the purchase of materials a few years old. Non-book materials tend to date less quickly than print materials, but their currency is still an important selection criterion.

   Another consideration is the durability of the subject. Be cautious of over-ordering to meet short-lived fads. By the time you receive the material, the fad may well be over. This is particularly true when selecting materials for teenagers.

7. **Accuracy**

   Is the information contained in the material accurate? A recent publication date does not always indicate up-to-date material. For example, a book for children on the United States published in 1990 should contain census figures from within the last few years. 1980 figures are not good enough and may indicate old material elsewhere in the book. In subject fields, accuracy is difficult for a non-specialist to determine. Book and film reviews can be valuable in determining the credibility of the material.

8. **Impartiality**

   Part of collection building is ensuring that your collection presents all sides of an issue. Works which are impartial and which present all sides of a topic can be found on most controversial subjects. If an item you are considering for selection presents only one point of view, you will want to be sure that you find something to represent other opinions. "Abortion" is an example of such an issue about which many materials are being published. In the face of pressure from both pro-choice and pro-life groups, libraries must try to represent all sides equally. It would be better to have a gap in your collection on this subject than to appear to support one view by representing only one opinion.

9. **Literary Merit**

   Is the material well written, with a relevant theme which is likely to have long-term appeal to readers? Are the characters well developed? Literary merit is almost impossible to judge without reading the material all the way through. Reviews and awards lists are very useful in identifying materials of outstanding literary quality.

10. **Arrangement and Organization**

Chapters should follow one another logically in examining the topic. Illustrations and maps should be placed close to the appropriate sections. Is there an index? Books of history or biology with no index will be difficult to use when readers are looking for specific information.

11. **School Assignments**

Public libraries usually do not select material to directly support school curricula. Is the material you are considering likely to be used only by grade five students doing reports, or will other children borrow it out of interest? Will adult users enjoy the astronomy book which is in demand for grade nine science classes?

12. **Demand**

When a particular book is in high demand, its purchase should be considered in spite of unfavourable evaluation using the above criteria. Popular authors such as Danielle Steel and Sidney Sheldon are often poorly reviewed, but as library staff know, their books will be asked for almost daily. In some cases, demand for particular authors is so great that duplicate or even multiple copies of a book should be considered even for small libraries. Paperbacks are a great help in meeting the demand for extra copies of books by popular authors, but paperbacks are published months after the hardbacks and will not satisfy the immediate demand.

13. **Canadian or Local Content**

Selection procedures should specify that setting or authorship will take priority over other criteria in considering books by local authors or Canadian books. However, the other criteria should not be completely overlooked. Libraries wanting to support the Canadian publishing industry should strive to find good quality material, and much is available. Library users of all ages have a right to expect a good representation of Canadian materials in their libraries.

B. Physical Form

1. **Format**

Collection development policies will state whether the library will purchase or borrow books in languages other than English, talking books, and audio-visual materials. Selection criteria will then be applied to these materials.

2. **Binding**

Hardback books are often available in "trade" or "library" bindings. While the sewn spine of a "library-bound" book should last much longer than a glued "trade" edition, it will also cost as much as a third more. If the book being considered is of current interest but unlikely to be in demand for the long term, perhaps a trade binding is adequate. On the other hand, a library edition of a popular children's favourite such as *Curious George* will be well worth the extra cost.

Paperbacks are especially useful as duplicate copies of in-demand material. However, they are likely to have a much shorter shelf life than any hardback book and are usually released several months after the hardback copy.

Some bindings are simply not suitable for library use. Materials that are coil or loose-leaf bound pull away from their bindings very quickly and are difficult to repair. However, some important books, especially reference materials, are available only in these bindings and must be purchased anyway.

3. **Appearance**

Many library users choose their reading materials mainly by appearance. A good appearance ensures that a book will be borrowed, and the high standard of content ensures that it will be read once borrowed.

4. **Illustrations**

These are important in works for young children and in many non-fiction materials. Judge them by their appropriateness for the type and level of the book, and by the skill of the artist in conveying the important features of the story. Accurate illustrations and correct labelling are essential in technical works.

5. **Size**

Very young children are often fond of very small books. Pre-teens will sometimes shun a large book which looks like a picture book, no matter what it is about. Over-size books may cause difficulty in shelving and handling in the library.

6. **Price**

Even if a book meets all other criteria for selection, it may be rejected because of its price. On the other hand, price should not automatically dictate whether or not a book is purchased.

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Chapter Four

SELECTION TOOLS

Selection tools help you evaluate items to purchase for your collection. Evaluative tools are those that appraise items and state whether or not they are recommended for purchase. Non-evaluative tools do not offer any critical analysis. They are simply lists of material available.

A. Role of the Library System

Library systems provide guidance to their member libraries in the selection of materials. Review publications located centrally at a system's headquarters may be available for borrowing by member libraries, depending on the practice in the system. Some library systems do the selecting centrally with suggestions from want lists prepared by member libraries and sent to headquarters.

Some library systems operate bookstores at their headquarters with shelves of useful material chosen from review publications by headquarters staff. Member libraries can then examine the preselected material before choosing items for their own shelves.

B. Basic Selection/Review Tools

The broad categories of tools include bibliographies, annotated lists and reviews.

1. **Comprehensive bibliographies** are used to verify that materials exist or are still available. They are useful for finding authors for users who know only the titles they want, or titles for users who know only the authors they want. You will find the following tools useful:

   Books in Print (BIP). Annual. Lists U.S. titles currently in print, with price and publisher. Author index and title index. Includes list of publishers' names and addresses.

   Subject Guide to Books in Print. Subject arrangement of BIP.

   Canadian Books in Print (CBIP). Annual. Canadian equivalent of BIP with Canadian prices and publishers. Lists only books published in Canada.

   Canadian Books in Print: Subject Index. Subject arrangement of CBIP.

   These tools should be no more than five years old. In small communities, public and school libraries that work well together may be able to alternate years for buying BIP. If you are a member of a system, the system will advise you about purchasing these tools.

2. **Annotated lists.** Specialized bibliographies are selected lists and include brief descriptions of the content of the materials listed. These bibliographies are valuable for building up collections that are missing some of the basics, and for assessing the titles that you do have. However, because they date quickly, these bibliographies may include materials that are no longer available. Some of the standard titles in this category are:

   The Wilson catalogs: *Public Library Catalog, Fiction Catalog, Children's Catalog.* Annotated lists of what are considered to be the "best" books available in adult fiction, children's books, etc. Arranged according to Dewey Decimal Classification, with full cataloguing information. Completely revised every five years. Includes annual updates between revision years.

   Canadian Selection: Books and Periodicals for Libraries, second edition, 1985.

   England, Claire. *Guide to Basic Reference Materials for Canadian Libraries,* 1984.

   Wynar, Bohdan S. *Recommended Reference Books for Small and Medium-Sized Libraries,* annual.

   These titles may be shared between several libraries in the same area, and may be available through interlibrary loan.

3. **Reviews.** There are all kinds of sources of reviews available, but some are more reliable than others. Among the best known and most useful review periodicals for small public libraries are:

   Booklist. Reviews adult, young adult and children's materials. Features a regular section on reference materials and special bibliographies on various subjects.

   Library Journal. Features articles on many facets of librarianship. Reviews adult and non-book materials.

   Quill & Quire. Most up-to-date source of information on Canadian publishing. Reviews selected current books. Brief annotations on many others. Slightly less expensive than most of the American publications. Twice a year it includes *Canadian Publishers Directory,* a vendor list of addresses for Canadian sources for books by non-Canadian publishers, useful for ordering.

   Forthcoming Books. Prepared by the National Library of Canada. It is inserted monthly in Quill and Quire.

   Books in Canada. Less expensive than Quill & Quire. Published nine times/year. Features both short and long reviews and review essays. Some issues feature children's and young adult reviews.

   School Library Journal. Reviews children's material.

   When using review periodicals for selection or collection assessment, you should remember:

   - the criteria of the reviewer may be different from your criteria
   - the community served by the reviewer may be different from your community.

Consequently, even the most highly praised materials may not be suitable for your library. The main advantage of review periodicals over specialized bibliographies is their currency. Many reviews are printed in review periodicals even before the books are published. You can be reasonably sure that materials reviewed in the current *Booklist* will be available for several months.

If you are not prepared to pay the annual subscription fee for one of the above periodicals, you can still find many book review sources. *The Edmonton Journal* and *Calgary Herald* have weekly book sections. Many magazines, such as *Time, MacLean's, Parents,* and many others such as science and handicraft magazines, feature regular book reviews.

Chapter Five

WEEDING

Weeding is the systematic removal of dated, unused and worn materials from the library shelves. The weeding process is an integral part of collection development and requires as much time and thought as materials selection requires. Weeding and selection keep the library collection functional and current.

Responsibility for weeding should be designated. In almost all public libraries, library staff or one staff member handles the weeding process and makes the final decision about whether or not an item is to be removed from the library. Library systems provide comprehensive guidelines to assist member libraries with the weeding process.

A. Purpose

There are a number of good reasons for regular weeding. You weed in order to:

1. Utilize the available space in your library in the best and most economical way. The interlibrary loan system can be used to obtain little-used materials that would crowd the shelves if purchased.
2. Maintain the reliability of the library collection. For example, outdated or superseded materials may give incorrect information to library users. Pictures or books showing dated fashions or living styles reduce the credibility of the audio-visual or book collections.
3. Avoid the illusion of a well stocked library. Crowded shelves are seldom a sign of a healthy collection, but funding sources may view them as an indication that budgets can be cut. Remove outdated and unused materials to give a more accurate picture of the usefulness and size of the collection that is utilized.
4. Improve access to library materials. Library users and staff will be better able to find the materials they are looking for if the "dead wood" has been removed.
5. Give the library a clean and inviting appearance. Old and worn materials give the impression of an old and worn library which has not kept up its collection.
6. Find items which need replacing or repair. A systematic weeding and assessment process will ensure that problems are identified, so that much needed materials are available and in good condition.

B. Guidelines and Criteria

Weeding can be made easier by using formulas which suggest how long materials in various subjects should be held. Guidelines and formulas for weeding have been published in various publications. There are common criteria in these sources which are discussed here.

Although it is important, the publication date is not the only criterion for weeding. Other criteria include:

1. **Lack of use.** Individual libraries may set their own guidelines for what constitutes lack of use. For example, fiction that has not been borrowed in the last few years is unlikely to be in demand in the future. In an especially busy or crowded library, however, the librarian might decide that one or two years of no circulation of fiction is enough to warrant withdrawal. Exceptions may be made in the case of classics which may seldom be used but are considered basic to any library. However, some libraries may decide to withdraw even these if they can be borrowed from another library. Regardless of lack of use or age, some books may be kept if the author is still publishing new books and patrons may want to read earlier works by that author. Use of non-fiction may be determined from both circulation and in-house use. Some non-fiction may be borrowed infrequently, but used often within the library.
2. **Change in programmes or local interests.** Keep in mind changes in community programmes. For example, several years ago adult education courses on decoupage were popular, and many libraries purchased materials to support local interest. In many locations that interest has waned and some of those materials are no longer required.
3. **Physical condition.** Books that are old, torn, or worn, and non-book material that is scratched or torn are all candidates for immediate weeding. Some items should be replaced, and basic selection tools will help in making such decisions.
4. **Duplication of materials.** When duplicates do not seem to be circulating, leave only one copy on the shelf and determine later whether that one copy should be weeded.
5. **Poor content.** Materials of poor content include those with outdated or false information, those that contain trivial subject matter or a trivial approach, and those that are poorly written.
6. **Age of material.** Ten years is generally the maximum that non-fiction materials should be held on library shelves. A shorter term of about five years is recommended for most science, technology and travel materials. Basic materials that do not date, such as some biographies, literary criticisms, and most cookbooks, should be kept as long as they are useful.

Chapter Six

COLLECTION ASSESSMENT METHODOLOGIES

There are two types of measurement that can be used in evaluating a library collection: quantitative and qualitative. Quantitative measurement refers to numbers. For example, how many books do you have in the total collection and how many in each subject area, or how many times have particular books circulated? Qualitative measurement refers to quality, that is, how useful and worthwhile the various materials are. In order to measure your collection both quantitatively and qualitatively, you will need to use a combination of methods. The following five are generally accepted as effective:

- compiling statistics;
- checking lists, catalogues, bibliographies;
- user studies;
- direct observation; and,
- review by consultants/subject experts.

A. Compiling Statistics

Many libraries already keep statistics about various aspects of service such as: **total circulation** by day, month and year; **total membership;** the number of **reference questions** answered over a period of time and those for which no answer could be found; and, the number of **interlibrary loans** requested and/or received. These figures alone can indicate how well the collection is being used, especially when they are compared with those of other libraries of similar size. The Library Services Branch publishes public library statistics annually and distributes them to all public libraries in Alberta.

You can find out even more about collection use by examining these statistics more closely. For example, by breaking down your **membership statistics** into adult, child and senior citizen (or whatever categories your library uses), and comparing the results with the census data on population age breakdowns, you can see which groups use the library most. You must then decide why one group is a heavier user than another. Is your children's collection stronger than your adult collection or is your town's large "under 15" population responsible for the heavy use? Perhaps your adult fiction collection is weak and local adults are buying paperbacks rather than using the library.

Now you can look at the **circulation statistics.** Some libraries regularly break these down by Dewey class. For example, how many 100s, 200s, and 300s have circulated each day? How many large print or picture books have been borrowed? This kind of data can be kept on a daily basis. However, if this is too time-consuming, the same results can be achieved if the statistics are kept over a limited time period of perhaps three or four weeks a year, or one week of each month. Comparing usage statistics over several years can show whether goals are being met in improving the collection.

While circulation statistics are important, they are not the only usage statistics to be considered. **In-house use** of materials, while more difficult to measure, should also be considered in evaluating your collection. Some books and many periodicals are used a great deal in the library but are seldom borrowed. In-house use can probably never be measured precisely because some users return the materials to the shelves. Simply keeping track of the subject areas of items cleared from tables, however, will give you some feeling for how often these materials are used in the library. Placing signs on shelves and tables that ask users not to reshelve materials will improve the accuracy of your findings. This process need not be carried out year round but could be carried out three or four weeks out of the year.

Neither circulation nor in-house use figures can be used in isolation. They must be considered in combination with the **library's holdings.** How many mysteries does your library have? If 50% of your adult fiction collection is mysteries, then you will not be surprised that 50% of your adult fiction circulation is accounted for by mysteries. It may also show that the rest of the fiction collection does not reflect community interests. How many titles do you have in the 500s? If you have only ten or twenty, you can expect that circulation of the 500s will be very low. If you have a large collection of current periodicals, the chances are that many of them will be used by users who read them in the library.

Your **reference statistics** can tell you how useful your collection is. Are you able to answer most of the questions you get? Keep track of the subject areas of your questions. You may find that you are consistently unable to answer questions about music or travel. One or two unanswered questions in a month may not be significant, but if you had five questions about planning a holiday in Mexico that you could not answer, perhaps you need to improve that area.

Interlibrary loan statistics can give you similar information about how useful your collection is. If you keep track of the subject areas most requested, you will get an indication of areas of the collection that need to be developed.

Statistics can point you toward areas that need to be looked at. They provide a quantitative measure of your collection. But you will also need some qualitative standards when assessing your library.

Following are samples of forms which can be used for collecting circulation and reference statistics.

CIRCULATION RECORD

Month _____ Year _____

Date	Adult Circulation													Juvenile Circulation												
	000	100	200	300	400	500	600	700	800	900	Fiction	Paper-backs	A-V	000	100	200	300	400	500	600	700	800	900	Fiction	Paper-backs	A-V	DAILY TOTAL
1																											
2																											
3																											
4																											
5																											
6																											
7																											
8																											
9																											
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27																											
28																											
29																											
30																											
31																											
TOTAL																											

CIRCULATION RECORD

Month _____ Year _____

Date	ADULT		JUVENILE		NON-PRINT		PERIODICALS		PAPERBACKS		TALKING BOOKS		DAILY TOTAL
	Fiction	Non Fiction	Fiction	Non Fiction	Videos	Records/ Cassettes	Adult	Juvenile	Adult	Juvenile	Restricted	Not Restricted	
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
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22													
23													
24													
25													
26													
27													
28													
29													
30													
31													
TOTAL													

REFERENCE STATISTICS
Daily Record

Date _____ Year _____

A. Tally

B. Research

Question	Referred To

Note: A tally of **all** questions asked during the day is to be kept in Section A.
Questions requiring research or referral are to be noted in Section B.

REFERENCE STATISTICS
Weekly Record

Date _____ Year _____

A. Tally

Monday _____

Tuesday _____

Wednesday _____

Thursday _____

Friday _____

Saturday _____

Sunday _____

B. Research

Question	Referred To

Note: A tally of **all** questions asked daily is to be kept in Section A.
Questions requiring research or referral are to be noted in Section B.

B. Checking Lists, Catalogues, Bibliographies

There are many lists that you can use to evaluate your book collection. The same types of publications as are used for book selection can be used in collection assessment. The usual procedure for checking your holdings against a list is to sit down with your author/title catalogue and the list being used, and compare the two. Your card catalogue, or a union catalogue of your system that indicates your holdings, can be used. This comparison will reveal differences in holding rates for various subject areas, pointing out strengths and weaknesses in the collection. The types of lists vary as to their usefulness in collection assessment. Some will give you only quantitative information, and others will give you both quantitative and qualitative data.

1. **Comprehensive bibliographies,** such as *Books in Print, Subject Guide to Books in Print,* and *Canadian Books in Print* tell you nothing about the content of the material. However, they can be useful in determining, for example, which of John Steinbeck's novels are still in print and which ones you do not have, or what is available on a given subject compared to what you have in your collection. Comprehensive bibliographies are quantitative checklists, rather than qualitative.

2. **Specialized bibliographies,** such as the Wilson *Public Library Catalog,* or specially prepared lists of books, such as lists on pregnancy and prenatal care put out by hospitals offering prenatal classes, or books on child development recommended by the local child psychologist. They concentrate on a specified subject or area of interest. Since they are usually prepared by recognized organizations or groups and contain materials recommended by that body, they provide a qualitative measure of your collection.

   Specialized bibliographies are more useful in collection assessment than comprehensive bibliographies because their contents have been selected from a body of work. Their suitability for listing has been judged by the criteria of the organization which published the list, and the criteria may be similar to those used by your library.

   Awards lists also, are specialized bibliographies. Such lists are printed in various library periodicals, and several publications produce their own lists of "Best Books" each year. While small libraries cannot be expected to have all the award winning titles, those of interest should be in the collection. The winners of some awards, particularly those for children's books, such as the Canadian Library Association Book of the Year for Children, the Amelia Frances Howard-Gibbon Award, and the American Newbery and Caldecott awards, should be well represented.

3. **Current bestseller lists** are available from many sources, including *MacLean's* and *Time* magazines. A book's inclusion on a bestseller list does not mean that it should be found in every library. However, it is an indication of the popularity of that book in a particular geographic area at a particular time, and suggests that the book warrants consideration.

4. **Review journals** such as *Library Journal* and *Booklist.* Most review journals have starred reviews that warrant special attention, and annual lists of the best books, videos, or films of the year. Often they have sections with bibliographies on topics of current interest. Review journals provide a way to keep your collection up-to-date.

There are no guidelines for how many items from a given list libraries should have, and any list must be considered in terms of how its objectives match those of your library. It is probably not feasible to check your entire library collection against recommended lists. However, it is a valuable method for assessing problem areas which have been pointed out by other methods or which are suspected to be deficient.

C. User Studies

User studies are important in assessing and planning collection development. You need to know how your users view the library's collection. Even if your membership and circulation are both high, there may be areas of your collection that users would like to see improved. There are several ways of finding out how your users feel about your collection.

1. **Informal interviews.** Each time you speak to a library user, you have an opportunity to poll him or her about the collection. These interviews are important in giving you an overall feeling for whether or not your users are satisfied with the materials they have found. Ask frequently: did you find what you were looking for? If the answer is no, follow through by finding out more about what the user wanted, so that you are sure about what he thinks is missing from your collection. Keep track of authors, titles and subjects that were requested but not supplied to your users. When you review these each month, or a couple of times a year, you will likely notice trends which indicate areas of the collection that need work.

2. **Questionnaires** about the library collection need not be long and involved. Because you want information on a particular aspect of library service, the types of questions you ask should be quite limited. Ask only library users, since non-users are unfamiliar with the collection. A questionnaire also gets users more interested in the collection and is a useful public relations tool.

3. **Other sources of user input**

- User requests indicate subject areas that need to be improved and also point out specific titles missing from your collection.
- Keep track of titles that are requested more than once through interlibrary loan or that have many reserves on them.
- A suggestion box gives you recommendations and indicates to your users that you are interested in meeting their needs.

D. Direct Observation

Direct observation means two things: first, observing which books circulate most, and second, going directly to the shelves and looking at the books that are there in order to judge their physical condition, their currency and their relation to other materials in their area. This process is often combined with weeding a collection. Volume Two of this manual provides a methodology for assessing the collection by observation.

E. Review by Consultants/Subject Experts

Consultants can make collection assessment much easier. Library systems have consultants available to help member libraries review and evaluate their collections. In examining your collection, the consultants may be more objective than you are, and may carry out the process more quickly than you could. Their expertise enables them to judge your collection qualitatively as well as quantitatively, as long as they understand the community. Having the results of the needs assessment and any statistical information collected by the library will help them with their evaluation.

If you look around your community, you may find experts in various areas who could help you. Ask your community social worker or psychologist to have a look at your psychology or child care sections. Give him or her specific guidelines, such as: which of the materials are out-of-date; which of these titles would you recommend to your clients; which titles are basic in your opinion; and, which basic titles are missing. The secretary or clerk in your town office may be willing to look over your collection of local government documents and tell you which have been superseded and which are missing.

Involving the community in the library in this way has another advantage. It gives community members an opportunity to have a good look at your collection, thus increasing their awareness of the potential use they can make of it. It shows them that the library is concerned about their subject area.

Chapter Seven

DEVELOPING A PLAN FOR COLLECTION DEVELOPMENT

A collection development plan should be part of the plan of service developed for your library. It is unique to your library. There is no set format or procedure that must be followed, but for the plan to be effective, it should be based on a multi-year approach and should contain three components: the long-term plan; the short-term plan; and, the buying plan.

As with all the steps preceding the actual planning, library staff and boards should have input into setting up long-term and short-term plans. In some cases, the board outlines the long-term plan and the staff proposes short-term methods of achieving it. Often, however, the library staff takes on responsibility for proposing both short-term and long-term plans for the approval of library boards. Buying plans are almost always outlined by library staff. All parts of the plan are subject to revision, and should serve as guidelines to collection building rather than as requirements.

A. Long-Term Plan

The long-term plan includes a statement of long-term goals for the collection. It requires consideration of the information gathered about the collection and the community, and states the collecting intentions of the library over a number of years.

The first step in developing a long-term plan is to list collection goals. These will be fairly general and should reflect the current and projected community population and the current collection. For example, the library might aim to:

- respond to the growing preschool population by upgrading the picture book and junior collections;
- recognize that the large number of 25 to 44 year olds should be reflected by building up those areas in which they have indicated an interest, such as parenting, recreation, travel, and social sciences; and,
- anticipate the projected growth in the town by increasing the overall size of the collection to meet growing needs.

The next step is to decide what the ideal collection size is for your town. It is useful to give some detail, setting down percentages in each subject area or Dewey range. Once again, these figures will be unique to each library because they take into account the results of the needs and collection assessments. For example, a library in a town with a population of 5,000 might set a collection size of 18,000 volumes as its goal, and might break that down by saying 60% will be adult and 40% children's books, and the adult material will be composed of 5% reference, 55% nonfiction and 40% fiction material. A further breakdown might indicate the adult nonfiction will be composed of 2% 100s, 2% 200s, 10% 300s, 1% 400s, 20% 500s, etc. The percentages would be based on identified community needs and interests, and on the state of the collection.

With the goals and the minimum figures set down, planners can decide what is a reasonable time in which to achieve them. A long-term plan usually projects ahead at least three years, but more commonly is for five years, and is part of the plan of service developed for the library.

B. Short-Term Plan

The short-term plan looks at the priorities set in the long-term plan and determines how they will be achieved. It details what will be done each year, outlining priorities for the upcoming year, and taking into account progress made in the previous year. It takes into account such factors as budget, inflation, and changes in the community or in library use. While the short-term plan is responsive to changes, it must still deal with carrying out the long-term plan.

C. Buying Plan

The buying plan explains how annual materials budgets will be allocated to achieve the short-term plan. It is also possible to project your buying plans over the long-term, so that you can predict approximately how much money will be required to achieve your long-term collection goals. Each year the materials budget should be broken down into percentages, as shown in the example below.

Sample plan for developing a public library collection:

Areas of priority:

1. Parenting
2. Picture books
3. Children's fiction
4. Teen material

Allocation of annual book budget:

a) Adult		45%
	Current non-fiction	13%
	Current fiction	10%
	*Basic non-fiction	16%
	Basic fiction	6%
b) *Teen material (almost all fiction)		3%
c) Junior		40%
	Current non-fiction	7%
	Current fiction	9%
	*Basic fiction	12%
	*Picture books	12%
d) Reference		7%
e) Replacements		5%
		100%

denotes areas that have been identified as priorities for development

In this case the budget has been divided into Current and Basic sections where "current" indicates ephemeral or changing collections such as paperbacks, current fads, bestsellers, and materials published in the current year. "Basic" refers to those items that are standard in the collection, i.e., items which are essential in order to have a well-rounded collection. This particular budget plan deals only with books. Money for rebinding, periodicals, and non-book materials is allocated in another part of the budget.

Libraries needing large numbers of large print materials or materials in languages other than English might allocate a portion of fiction and non-fiction budgets to the purchase of these. (Non-English materials can be borrowed through Alberta Culture and Multiculturalism's Multilingual Biblioservice if your library has decided not to purchase them.)

Many small public libraries are purchasing some non-book materials. Here is a sample plan for building up a small collection of audiocassettes. The year's audiovisual budget might be allocated as follows:

Adult	55%
classical music	20%
spoken word	35%
(new collection to be established)	
Children	45%
preschool music	15%
preschool spoken word	10%
junior music	8%
junior spoken word	12%

Another more general plan would deal with the whole materials budget allocating money for each type of material, and then subdividing each item as in the samples above. Here is an example:

Periodicals	10%
Rebinding	5%
General replacements	10%
Reference materials	10%
Children's materials	30%
Adult materials	35%

In order to develop a plan for collection development, an assessment of your present collection should be done. Volume Two of this manual gives you a methodology for assessing the adult nonfiction collection. You can expand the concepts to include the entire nonfiction collection. You will then have a foundation upon which to build your collection development plan.

Chapter Eight

NON-BOOK COLLECTIONS

The development of non-book collections in your library depends on three factors: commitment; ability; and, community need.

1. **Commitment** requires a statement in the collection development policy about acquiring and maintaining non-print materials. More importantly, money must be specifically allocated in the budget to develop and maintain a non-print material collection.
2. **Ability** refers to the resources available to develop and maintain the collection. Is the funding available? Does the library staff have the necessary time and training? Is there space for the material and the equipment?
3. **Community need** must be identified. Users must desire and be willing to use material in non-print format.

A. Audio-Visual Materials

Some decision should be made about which media will be purchased and which borrowed, based on the interests of your community, and on what is available from sources beyond the library. There is no need to compete with other sources in the community. If there is a video rental store that stocks popular and new titles, then the library might consider purchasing classic movies and/or non-fiction videos.

There is a variety of audio-visual materials available to libraries, the most common of which are talking books, other audiocassettes, and videocassettes. Some library systems circulate audio-visual items to member libraries through interlibrary loans. Talking books for those unable to use conventional print are available through the library systems or through Alberta Culture and Multiculturalism, Library Services Branch, and are borrowed on a rotating basis.

In selecting audio-visual materials, use the same criteria as for print materials (accuracy, bias, etc.), but pay special attention to the suitability of the medium. Some questions to ask are:

1. Will you have public performance rights if the material is to be used with groups?
2. Is this medium the best way to present this particular concept?
3. Would the issue be covered as well and more inexpensively in another format or in print?
4. How convenient is the medium to use?
5. Do you have the appropriate equipment?
6. How long will the material last?
7. Will you let it circulate or be used only in the library? Why?
8. How much does it cost?
9. Is it available on loan from another source?
10. How much will the item be used?
11. How good are the technical qualities?
    - Is the sound understandable and in sync with the pictures?
    - Is the narrator's voice pleasant and effective?
    - Is the music appropriate?
    - Are the pictures clear and understandable?
    - Is the sequence logical?
    - Is the photography of good quality?

Some useful tools for selection of audio-visual materials are listed below.

1. *Audio Video Market Place: A Multi-Media Guide.* Biennial.

   Directory to AV services. Lists media producers and distributors, equipment, manufacturers, periodicals.

2. National Film Board. *Film Catalogue.* Annual.

   Catalogue of films and videocassettes produced and distributed by the NFB. Subject index. Arrangement alphabetical by title.

3. *Educational Film/Video Locator.*

   Union list of titles held by member libraries of the Consortium of University Film Centres. Includes subject, title, series indexes. Gives description of films and level.

4. *Feature Films on 8mm, 16mm and Videotape.*

   Directory of feature films available for rental, sale and lease in the U.S. and Canada. Alphabetical by title. Indexes of directors and foreign language films. Video inclusions are limited to those companies that have exclusive rights to a video version of a feature film.

5. *Film/Video Canadiana: Canada's National Filmography.* Annual.

   A yearbook of the Canadian film industry. Bibliographic data on over 2500 English and French language film productions. Indexes and listings—precis subject, broad subject, director, producer, production company, feature films since 1970, co-productions, directory of Canadian producers and film organizations. Annotations are non-evaluative.

6. *Video Source Book.*

   Lists over 35,000 prerecorded tapes and discs. Alphabetical by title within broad subject categories. Subject index and Sources index.

B. Periodicals

Periodicals vary significantly in readership appeal. They are important sources of current information and also provide a diversity of information not available in other forms.

1. **Magazines/Journals**

   Because subscriptions are very expensive, you must choose magazines carefully. Magazines chosen for adults in small libraries are usually for general patron use and often circulate. Articles in back issues can always be obtained from larger libraries which have back issues on microfiche and provide copies as part of interlibrary loan agreements.

   Two useful selection tools are *Magazines for Libraries* (Katz, 1989) and *Free Magazines for Libraries*, 3rd ed., by Adeline Mercer Smith and Diana Rovena Jones (Jefferson, N.C.: McFarland and Company, 1989.)

   In selecting magazines consider:

   a. Purpose: recreational browsing, in-depth research.

   b. Target group: general population, do-it-yourselfers, gardeners, etc.

   c. Content: Relevance—does information given apply to Canada? Bias. Completeness—for example, if puzzles are included, are answers given?

   d. Illustrations: good quality, color or black and white, captioned, logically placed.

   e. Format: attractive layout, good quality paper, print size, table of contents, and whether or not the magazine is indexed. Format is less critical if the content is considered to be valuable.

   How do you find out which subscriptions to order?

   a. Ask your patrons for suggestions. Ask them to lend you sample copies if they have them, or order sample copies from the publishers. Publishers' addresses are available in *Ulrich's International Periodicals Directory.*

   b. Keep a record of the journals from which you have ordered articles through interlibrary loan.

   c. Evaluate your subscriptions every year, asking your users or community groups to indicate their preferences.

   d. Do a short survey occasionally. This not only provides you with feedback about your subscriptions, but also heightens awareness in the community about the titles you have in your collection.

   e. Check *Reader's Guide to Periodical Literature, Abridged Reader's Guide* or *Canadian Periodical Index* for titles that are indexed.

2. **Newspapers**

   Every public library should have the local paper as well as a major newspaper. Larger libraries should have a national newspaper and one from the nearest large city. Small libraries can get copies of articles from large city libraries which keep back issues on microfilm.

C. Vertical File

If desired, a vertical file can be established. The file should be kept small enough to be manageable. Keeping the file up-to-date is time consuming but essential and requires constant weeding. To build up a vertical file, clippings from newspapers and articles from magazines are useful. There are several sources of information about free or reasonably priced materials which can also be used in the vertical file:

- journals such as *Library Journal* and *Wilson Library Journal;*
- *Exceptional Free Library Resource Materials* by Carol Smallwood (Littleton, Colorado: Libraries Unlimited, 1984);
- *Current Issues Resource Builder: Free and Inexpensive Materials for Librarians and Teachers* by Carol Smallwood. (Jefferson, N.C.: McFarland, 1989)
- local businesses and professional offices, such as the dentist's office, the police station, the local community college campus, the nearest travel agency, the bank, local car dealer, the Chamber of Commerce are likely sources of pamphlets or brochures of interest to library users;
- advertisements in journals for information which ranges from gardening catalogues to how-to-do-it pamphlets on computers;
- publications put out by trade associations and private industries. For example, the Standards Council of Canada has an excellent booklet promoting the use of standards. Someone in the community may belong to such an association and can alert you to these free publications, or you may see advertisements or promotions in the magazines the library subscribes to. Annual reports of companies contain a wealth of information and the best ones are listed in business magazines or the *Financial Post.*

D. Maps

Maps are often part of the vertical file material in smaller libraries. Some library systems have a map collection at headquarters from which maps are lent to member libraries. Other sources include:

- local Chamber of Commerce, and town, county, Municipal District offices;
- provincial planning departments such as Alberta Recreation and Parks, and Alberta Tourism;
- federal government departments such as Environment Canada, Agriculture Canada and Statistics Canada;
- maps issued with *National Geographic* magazine; and,
- foreign embassies.

E. Government Documents

The provincial and federal governments of Canada publish more items per year than any other publisher in the country. The Department of Consumer and Corporate Affairs, Agriculture Canada, and the Department of National Health and Welfare publish many free and inexpensive pamphlets of interest to the public. Catalogues of their publications can generally be obtained by writing to these departments, and selection of items that would be useful to the library can then be made. Address your request for material from the federal government to the Marketing Group, Canadian Government Publishing Centre, Ottawa, Canada, K1A 0S9.

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